

ECi Regional Users Meeting



ECi DDMS® **ECi** TeamDesign™ **ECi** OMD® **ECi** La Crosse™

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ecInteractive™
Enhance Your Customer's
Shopping Experience



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About Enhanced Shopping

ECi DDMS offers numerous tools in ecInteractive and is.D-Force2 to help you retain shoppers and improve their online shopping experience. This handout includes information for each of the following:

- Machine Matching
- Registering New Users and User Types
- JumpTech Integration
- Multi-Department Ordering
- Order Approval
- Coupons and Promotions.

Machine Matching

Buying machine parts is easy for your shoppers when using the Machine Matching Tool. Once they select the machine, matching parts are listed automatically. They can then select the parts to order.

Setting Up the Machine Matching Feature



Before your shoppers can order machine parts, you must first allow access to the feature. You do this using Feature settings.

- 1 From the ecInteractive or is.D-Force2 Administrative window, click the Consumer Config training toolbar and choose Feature. You can also click Customer Settings and Select Feature.
- 2 The Select Setting drop down box defaults to display the New Feature Setting option. You can add, edit or delete settings.
 - To add a new setting, leave the Select Settings box to the New Feature Setting option. Click the Setting Name box and enter a name for the new setting. Go to **Step 3**.
 - To rename or edit an existing setting, click the down arrow in the Select Settings box and select the setting to change. Then click the Setting Name box and enter the new name over the existing name. Go to **Step 3**.
 - The Default setting name has been added for your convenience. To alter Default settings, click the down arrow in the Select Settings box and choose Default. Once you have edited the Default setting, we recommend you do not make further changes to this setting. Go to **Step 3**.
- 3 In the General tab, click the Access Machine Matching box to make this feature available to your users.

To delete an existing Feature setting, click the down arrow in the Select Settings box and select the setting to remove. Click Delete. At the Do You Want to Remove This Setting prompt, click OK. Feature settings cannot be deleted if they are currently assigned to a shopper.

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You can also use the Mass Setting Maintenance page to assign Feature settings to your shoppers.

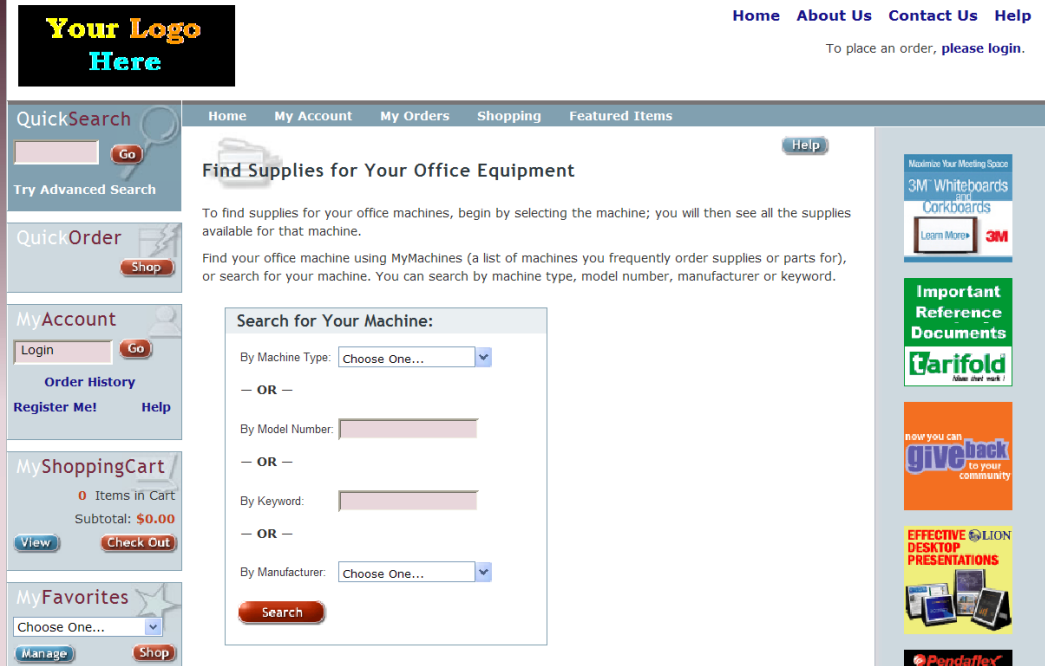
- 4 When finished, click Update to save an existing setting or click Save to save a new setting.
- 5 Click the Consumer Admin training toolbar and select Customer Maintenance, then Adding Accounts. You can also click Customer Admin and click Customer Management.
- 6 Retrieve the customer to edit. Click the box by which to search and enter the search criteria. Click Search.
- 7 When the customer appears, click  beside the customer to edit.
- 8 Click the Edit button.
- 9 Click the down arrow in the Feature box under the User Groupings heading to assign the feature setting you just added to this customer. To view information about the default settings you have specified, choose the feature setting and then click .
- 10 When finished, click Update.

Machine Matching Shopper's Experience

Once you allow access, your shoppers can easily search and use the Machine Matching tool.

- 1 From the ecInteractive or is.D-Force2 shopper's site, click Machine Matching. The Machine Matching Tool page opens. See Figure 1.

**Figure 1:
Searching for
Machines**



The screenshot shows a web page for searching office equipment. At the top, there is a navigation bar with links for Home, My Account, My Orders, Shopping, and Featured Items. A "Your Logo Here" placeholder is on the left, and a "To place an order, please login." message is on the right. The main content area is divided into several sections:

- QuickSearch:** A search bar with a "Go" button and a link to "Try Advanced Search".
- QuickOrder:** A "Shop" button.
- My Account:** Links for Login, Order History, Register Me!, and Help.
- My ShoppingCart:** Shows "0 Items in Cart" and a "Subtotal: \$0.00" with "View" and "Check Out" buttons.
- My Favorites:** A "Choose One..." dropdown menu with "Manage" and "Shop" buttons.
- Search for Your Machine:** A central search box with the following options:
 - By Machine Type: Choose One... (dropdown)
 - By Model Number: [Text Input]
 - By Keyword: [Text Input]
 - By Manufacturer: Choose One... (dropdown)A "Search" button is at the bottom of this section.
- Find Supplies for Your Office Equipment:** A section with a "Help" button and text explaining the tool: "To find supplies for your office machines, begin by selecting the machine; you will then see all the supplies available for that machine. Find your office machine using MyMachines (a list of machines you frequently order supplies or parts for), or search for your machine. You can search by machine type, model number, manufacturer or keyword."
- Right Sidebar:** Contains several promotional banners for 3M Whiteboards, Tarifold, and Lion Desktop Presentations.

- 2 Select a machine using any of the following methods:
 - Choose a machine from the menu, for example, Typewriter. Click the word Typewriter.
 - Choose a manufacturer from the menu. Click the name, for example, Minolta.
 - Choose a model number by clicking the number or name.
- 3 A list of items that meets the search terms opens. This includes the item description; an item picture, if available; item pricing information; and the item quantity.
- 4 The item number appears as a hypertext link. Click this link to view additional information about the item, including an extended item description and the catalog page number. When finished, click Back on your Internet browser to return to the Machine Matching Tool page.
- 5 To the right of the item number is the list price, packaging and quantity. Click the Quantity box to enter the quantity of the item to order.

Note: The Packaging column displays the item's unit of measure, for example, Each. In this case, you would enter the number of individual items to order. If the item's unit of measure is Box or Package, the product is sold in boxes or packages of more than one item. For these products, enter the number of boxes or packages to order, not the number of individual items.

- 6 From the drop down list box, select an option. Choose an option and click the check box beside it. This drop down list box displays at the top and bottom of the window.
 - **Select All:** Click this check box to add all the items shown to the order. Then click the Save Items to Cart or Add to Favorites button.
 - **Save Items to Cart:** Click the check box corresponding to the individual items to order. Once all the items are selected, click the Save Items to Cart button.
 - **Add to Favorites:** Click the check box corresponding to the specific item to add to the list. By adding items to your list of favorites, you can quickly retrieve the item to order it again. Once all the items are marked, click the Add to Favorites button.
- 7 When finished, click Continue Shopping or click Check Out.


Registering New Users and User Types

There are many options available when registering new users. ecInteractive and is.D-Force2 software versions 9.0.0 and greater give you control over how new shoppers open accounts with your business. You can create user type templates that apply to new users and set up self-registration options.

Setting Up User Type Templates For New Users

The User Types page lets you easily create templates to apply to new users. When new shoppers register on your storefront site, you can let them choose a User Type, or display a default User Type. Each Type you add contains information that you expect from the shopper during the account creation process. Create as many User Types as necessary. For example, you could:

- Create one default user type for all new shoppers and adjust it to offer a special discount (created in your back office system) for any new shoppers that self-register during a campaign.
 - Create several nearly identical user types, each assigned to a separate tax district, and name them according to the tax district.
 - Create a user type restricted to the AbilityOne/JWOD contract for your federal agency shoppers.
- 1 Click the Consumer Admin training toolbar and select User Types. You can also click Customer Admin and choose User Types.
 - 2 This page lets you create templates called User Types that can be used with the New User Registration feature. You can:

Click  to edit an existing User Type. Enter the new information over the existing information and click Update.

Click  to delete an existing User Type. At the Are You Sure prompt, click OK.

Click the Add a New User Type link to create a new user type. Click each box and enter the appropriate information. See Figure 2.

- **Description:** This box displays the description for the selected user type. You can specify a description of up to 50 alphanumeric characters. This description displays on the front-end site when a shopper creates a new account.
- **Location:** Click the down arrow to choose the default location from the list. This list includes all account locations defined in the Location Management page.

You specify whether to allow shoppers to choose a user type in the User Type Selection During Registration box in Site Preferences.

The GL, Inv, and Printer information comes from the Location Management page.

- **GL:** Click this box and enter the general ledger location. You can specify up to two alphanumeric characters.
- **Inv:** Click this box to assign a specific inventory location to this user type. You can specify up to two alphanumeric characters.
- **Printer:** Click this box and assign the logical name of the printer to use. You can specify up to two alphanumeric characters.
- **Route:** Click this box and enter the route from the back office business system.
- **Remarks:** This box displays remarks for the selected user type, if any. Click this box and enter any remarks associated with this user type. This box defaults to the Created Automatically By Online Ordering System text.
- **Drop Ship Flag:** Click this box and enter the drop ship setting from the back office business system for this user type.
- **Salesman ID:** Click this box to enter the salesperson account number for the selected user type. This is the salesperson ID for online accounts from the back office business system.

**Figure 2:
Adding a New
User Type**

The screenshot shows a web application interface for configuring user types. At the top, there is a header with a logo placeholder 'Your Logo Here', a login status 'You're logged in as: robini Logout', and a current site indicator 'Current site: To Be Determined' with a dropdown menu and a 'Go' button. Below the header is a navigation bar with tabs: 'Site Config', 'Product Management', 'Consumer Config', 'Consumer Admin', and 'Site Info'. The left sidebar contains a menu with categories: 'AdminSite', 'AdminUsers', 'CustomerAdmin' (selected), and 'CustomerSettings'. Under 'CustomerAdmin', there are links for 'Customer Groups', 'Customer Management', 'Login Errors', 'Order Management', 'Orphaned Users', 'Parameter Maintenance', 'User Types', and 'Customer Account Management'. Under 'CustomerSettings', there are links for 'Communication', 'Alternates/Substitutes', 'Approval Management', 'Checkout', 'Feature', 'Marketing', and 'Mass Setting Management'. The main content area is titled 'User Types' and contains a 'User Type Details' form with the following fields:

- Description: [Text input]
- Location: [Dropdown menu showing 'Default - GL:1 Inv:1 Printer:P1']
- GL: [Text input]
- Inv: [Text input]
- Printer: [Text input]
- Route: [Text input]
- Remarks: [Text input]
- Drop Ship Flag: [Text input]
- Salesman ID: [Text input]
- Taxable: [Radio buttons for 'Yes' and 'No', with 'No' selected]
- Taxable District: [Text input]
- Discount Type: [Dropdown menu showing 'None']
- Discount Percentage: [Text input showing '0']
- Contract ID 1: [Text input]

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- **Taxable:** This box displays the taxable setting for the selected user type. When adding and changing user types, click this box and enter the taxable setting from the back office business system to use.
- **Taxable District.** Click this box and enter the tax district from the back office business system for this user type.
- **Discount Type:** Click this box and enter the discount type from the back office business system.
- **Discount Percentage:** Click this box and enter the discount percentage to use, if any.
- **Contract ID 1-4:** Click these boxes and enter the contracts for this user type.
- **Contract Laundry Lists:** Click the corresponding contract and/or laundry lists to select them for the user type. The contracts and laundry lists available appear in alphabetical order to help you view and manage your lists. If the list is long, a scroll bar appears to the right of the page so you can quickly move up and down the list.
- **Select Item Limits:** These options let you select the item limits for this user type.
 - **None:** Allow the user type to view all catalogs and contract and/or laundry list items assigned to the account. This option means that the user type is not limited to viewing items from your back office lists. If you selected contract/laundry lists, the user type can see those items and any contract pricing that has been synchronized from your back office system.
 - **Restrict:** Restrict this user type to not view specific items. For example, you can set up a restricted contract and/or laundry list of items the selected user type cannot view. Once you check that laundry list, you then click the Restrict option so the user type cannot see or order these items when shopping. This is a useful feature if you need to restrict certain items such as furniture products from displaying on specific pages.
 - **Lock:** Specify the items this user type can view. When you click the down arrow in the corresponding box, you have two additional options. You can allow the user type to view and order all contract and/or laundry list items as well as items from his assigned catalogs or you can limit to only those items that exist in the contracts and/or laundry lists assigned. If you select Contracts Only, items from the chosen contracts and laundry lists override the user type's catalog group settings. The user

type is limited to only those contract and laundry list items you assign. This is a useful feature if you need to restrict to specific contracts and/or laundry list items only.

- **Lock Customer to Selected Catalogs:** This box lets you specify that this user type only catalogs you select in the Global and Custom boxes. To enable this feature, check the Lock Customer to Selected Catalogs box. The user type is restricted to only those catalogs you specified.
- **HP Purchase Edge:** Indicate whether to make the Hewlett Packard Purchase Edge feature available to this user type on the shopper's Home page. PurchasEdge is an easy-to-use program that rewards your end users for purchasing original HP (Hewlett Packard) supplies. As a PurchasEdge member, your shoppers earn points for each qualified purchase made. Once enrolled, users receive access to the PurchasEdge site where points can be redeemed online for free HP products, including printers, digital cameras, and PDAs. Your end users can enjoy exclusive HP promotions as well as a personalized site, quarterly statements and many special offers. For more information concerning this feature, see www.hp.com/sbso/special/purchasedge/. To sign up see www.eci2.com/customers/hp/purchasedge.htm. Be sure you are set up to use the ECi Private Supply Network (PSN) services.
- **Global Catalog Group:** Click the down arrow in this box to assign the global catalog group to this user type.
- **Custom Catalog Group:** Click the down arrow in this box to assign the custom catalog group to this user type.
- **Alt/Sub Setting:** Click the down arrow in the Alt/Sub box to assign alternate and substitute settings to this user type.
- **Checkout Setting:** Click the down arrow in the Checkout box to assign checkout settings to this user type.
- **Communication Setting:** Click the down arrow in the Communication box to assign communication settings to this user type.
- **Feature Setting:** Click the down arrow in the Feature box to assign feature settings to this user type.
- **Marketing Setting:** Click the down arrow in the Marketing box to assign marketing settings to this user type.
- **Price Setting:** Click the down arrow in the Price box to assign price settings to this user type.

3 When finished, click Save.

Use Customer Settings to set up default alt/sub, checkout, communication, feature, marketing, and price settings.

Setting Site Preferences for Self-Registration

After your User Types are defined, use the Site Preferences page

- 1 Click the Site Config training toolbar and choose Site Preferences. You can also click Global Settings and click Site Preferences.
- 2 Click **Edit**. Click the following boxes to set up the New User Registration feature:
 - **Allow Customer Registration:** These options let you specify how to handle new customer registration.
 - **Create Online Account:** Allow shoppers to register an account on the front-end site. This setting can be used when potential shoppers already have an account set up on the back office business system. Selecting this option forces them to supply their back office account information before proceeding. It prevents them from creating a back office account during the account creation process.
 - **Create Backend and Online Account:** Allow shoppers to register an account on the front-end site as well as on the back office business system. This setting can be used for potential users who are not already assigned to a back office business account. Selecting this option forces them to create a new back office account before proceeding.
 - **Allow Both Methods:** Allow shoppers to register an account on the front-end site and the back office business system. This setting combines both settings described above. It allows users to supply an existing back office account if they are already assigned to one or it allows the user to create a new backend account before proceeding. For this method, an additional prompt asks the user which method they prefer to create a new account.
 - **No Automatic Account Creation (default):** Do not allow shoppers to register. If you select this option, the user enters information which is sent to you as an email but the information is not entered into the back office business system nor is a user account created on the front-end site. This gives you the option of adding the user to the back office and front-end systems.
 - **User Type Selection During Registration:** This box works with the Allow Customer Registration box and lets the shopper select a user type from a list of user types when creating a new account. You can set up multiple user types using the User Types page. Click the Allow User Type Selection option to allow shoppers the

ability to select a user type when creating an account. To deny users the ability to choose a user type when creating a new account, click the Use Default User Type option.

New Registration Shopper's Experience

When shoppers who have not logged in attempt to open the secure Checkout page on your site, the Login page prompts them to enter their credentials before proceeding. This page also gives them the options to create an account that you have specified, as shown in Figure 3.

When they click a link to create an online account, the account registration page prompts them to specify a user name, password, email, security question, and user type, if available.

Figure 3: The Create Account Option When Logging In

The screenshot shows a login page for ECI. At the top left is a 'Log In' header with a person icon. In the center is a gear logo with 'ECI' below it. Below the logo is a welcome message: 'Thank you for visiting our site, please enter your user name and password to begin shopping.' A note states: 'Required fields have red labels and an asterisk.' There are two input fields: 'User Name *' and 'Password *', both with red asterisks. To the right of the password field is a link: 'Forgot your password?'. Below the fields is a red 'Log In' button. At the bottom, there is a 'New User?' section with two options: 'I know my account number and wish to create an online account.' and 'Create a completely new account.'

JumpTech Integration

Your system comes equipped with capabilities, including the ability to handle punchout orders using Jump Technologies (JumpTech). This system provides state-of-the-art inventory management features that can help automate supply ordering, thereby reducing operational costs and improving overall business performance.

If you subscribe, your shoppers install JumpTech client software and configure it once to point to your site URL. They are also given a JumpCart™ barcode reader used to scan item barcodes. After plugging JumpCart into their USB port, they are then prompted to enter a username, password, and department number to log into your site (using special encryption technology).

Once logged in, scanned items are automatically uploaded to their shopping cart. In order to process the order correctly, be sure you do not log out while processing a JumpTech order.

You can also use the External Partner Log page to view item and posting detail for XML ordering and procurement systems including JumpTech. You can limit to one or more punchout partners, customer users, process statuses, item departments, and dates. You can also view additional transaction step details and XML text. You can see items currently being stored in a temporary cart that have not posted to your back office business system.

Note: For more details concerning Jump Technologies, contact JumpTech at www.jumptech.com.

Viewing the External Partner Log

This page lets you view external partner item and posting detail for XML ordering and procurement systems including Jump Technologies (JumpTech). The log information is grouped so you can easily identify the chain of actions involved in a single process:

- 1 Click the Site Info training toolbar and choose External Partner Log. You can also click Admin Site and select External Partner Log. The External Partner Log page opens.
- 2 Since this page can become cluttered with information, you can set limits using each of the following columns.

Site Name: The name of the site to which the external partner's items have been added.




Partner: The name of the external partner where the items originated.

User: The name of user who loaded the external partner's items to the system. This user should have a valid user name and password to log into the system.

Dept: The department information to which the items have been posted.

Status: The status of the process. Possible statuses include: Adding Items to Temp Cart Failed, Adding Items to Temp Cart Succeeded, Adding Items to Cart Failed, and Adding Items to Cart Succeeded.

Created Date: The date and time when the process began.

- 3 Click the box by which to limit and enter the information. Then, click the  (down arrow) to the right of the box and select the limit. For example, you can set a filter using the Partner box to only include log files pertaining to JumpTech. To do this, you would click the Partner box and type JumpTech. Then, click  and select the Contains filter. The list refreshes, containing only the information specified.
- 4 To view additional log step detail, click  to the left of the transaction to view. All the steps logged for a single transaction appear and include the following detail, as shown in Figure 4:

Message: The detailed text describing each step logged during the process.

DateTime: The date and time when the step was logged.

Click , if available, to view the full XML text saved for the transaction.

Click  to hide the full XML text when finished viewing.

Figure 4:
Viewing the
External Partner
Log

The screenshot displays the 'External Partner Log' interface. At the top, it shows the user is logged in as 'docwriter' and the current site is 'QA Site 1'. There are 256 alerts. The navigation menu on the left includes: AdminSite, AdminUsers, CustomerAdmin, CustomerSettings, GlobalSettings, MarketingTools, SiteCustomizing, SiteInfo, SiteStats, Rewards, and SiteText. The main content area is titled 'External Partner Log' and includes a sub-header: 'This page will allow you to view the history of reading data from external partners and posting items to ecInteractive system.' Below this is a table with columns: Site Name, Partner, User, Dept, Status, and Created Date. A transaction for 'QA Site 2' with partner 'MeadWestvaco' is selected, showing a 'Logged Steps' section with a table of messages and their timestamps. Below this is an 'Items in Temporary Cart' section showing 'No items.'

Site Name	Partner	User	Dept	Status	Created Date
QA Site 2	MeadWestvaco			Adding items to cart succeeded.	9/2/2009 7:31:39 AM

Logged Steps	
Message	DateTime
Ending Handler Processing	9/2/2009 7:31:39 AM
ResponseBult	9/2/2009 7:31:39 AM
{722f91e6-9d04-4642-9a32-9c78007becc0}	9/2/2009 7:31:39 AM
AAGA152AAGA152AAGA152EA31.29	9/2/2009 7:31:39 AM
722f91e6-9d04-4642-9a32-9c78007becc0 AAGA152	9/2/2009 7:31:39 AM
Xml Input Document loaded and validated against DTD	9/2/2009 7:31:39 AM
Partner identified	9/2/2009 7:31:39 AM
RawInputRead	9/2/2009 7:31:39 AM
Starting Handler Processing	9/2/2009 7:31:39 AM

Items in Temporary Cart	
SKU	Quantity
No items.	

QA Site 2	MeadWestvaco	Adding items to cart succeeded.	9/2/2009 7:31:38 AM
QA Site 2	MeadWestvaco	Adding items to cart succeeded.	9/2/2009 7:31:37 AM

- 5 You can also view items that have not been posted to the system and which are currently being stored in a temporary cart. These items appear under the Items in Temporary Cart heading. If items are not being stored in a temporary cart, the text No Items displays. You can view the following information for temporary cart items:

SKU: The item's SKU.

Quantity: The quantity ordered of each item.



Multi-Department Ordering

This feature lets you specify that shoppers can place orders for more than one department on your ecInteractive site. This option is useful when accounts have multiple departments set up in your back office business system. It lets them specify the department to use for any line item in both the Quick Order and Shopping Cart pages. Department information also appears on the shopper's Checkout page.

Setting Up the Multi-Department Ordering Feature

Before your shoppers can place orders for multiple departments, you must first allow access to the feature using Feature settings.

- 1 From the ecInteractive or is.D-Force2 Administrative window, click the Consumer Config training toolbar and choose Feature. You can also click Customer Settings and Select Feature.
- 2 The Select Setting drop down box defaults to display the New Feature Setting option. You can add, edit or delete settings.
 - To add a new setting, leave the Select Settings box to the New Feature Setting option. Click the Setting Name box and enter a name for the new setting. Go to **Step 3**.
 - To rename or edit an existing setting, click the down arrow in the Select Settings box and select the setting to change. Then click the Setting Name box and enter the new name over the existing name. Go to **Step 3**.
 - The Default setting name has been added for your convenience. To alter Default settings, click the down arrow in the Select Settings box and choose Default. Once you have edited the Default setting, we recommend you do not make further changes to this setting. Go to **Step 3**.
- 3 In the General tab, click the Allow Multi-Department Ordering box to make this feature available to your shoppers.
- 4 When finished, click Update to save an existing setting or click Save to save a new setting.

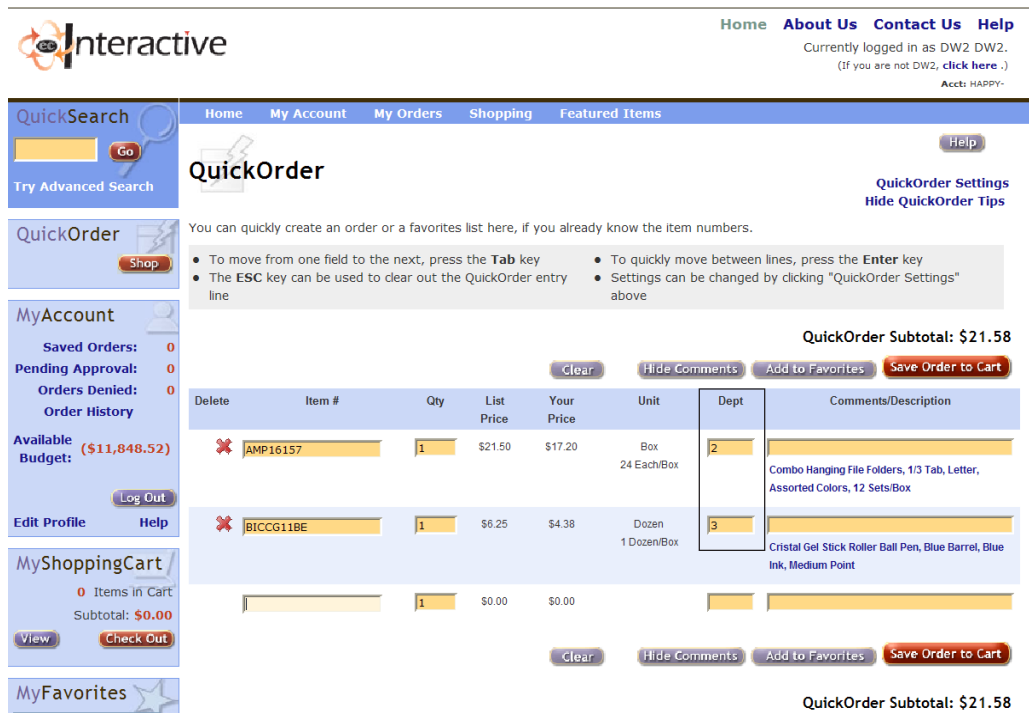
- 5 Click the Consumer Admin training toolbar. Select Customer Maintenance or click Customer Admin and click Customer Management.
- 6 Retrieve the customer to edit. Click the box by which to search and enter the search criteria. Click Search.
- 7 When the customer appears, click  beside the customer to edit.
- 8 Click the Edit button.
- 9 Click the down arrow in the Feature box under the User Groupings heading to assign the feature setting you just added to this customer. To view information about the default settings you have specified, choose the feature setting and then click .
- 10 When finished, click Update.

Multi-Department Ordering Shopper's Experience

Once you allow access, your shoppers can place orders for multiple departments.

- 1 From the ecInteractive or is.D-Force2 shopper's site, choose Shop in the Quick Order section of the page.
- 2 The Quick Order page opens. Notice that the Dept box is now available, as shown in Figure 5.

Figure 5: The Available Dept Box in Quick Order



The screenshot shows the ecInteractive QuickOrder page. At the top, there is a navigation bar with links for Home, My Account, My Orders, Shopping, and Featured Items. The user is logged in as DW2 DW2. The main content area is titled 'QuickOrder' and includes a search bar, a 'Shop' button, and a 'QuickOrder Settings' link. Below this, there are instructions for using the Tab and ESC keys. The shopping cart is displayed with two items:

Delete	Item #	Qty	List Price	Your Price	Unit	Dept	Comments/Description
	AMP16157	1	\$21.50	\$17.20	Box 24 Each/Box	2	Combo Hanging File Folders, 1/3 Tab, Letter, Assorted Colors, 12 Sets/Box
	BICCG11BE	1	\$6.25	\$4.38	Dozen 1 Dozen/Box	3	Cristal Gel Stick Roller Ball Pen, Blue Barrel, Blue Ink, Medium Point

The 'Dept' dropdown menu is open, showing options 2 and 3. The cart subtotal is \$21.58. There are buttons for 'Clear', 'Hide Comments', 'Add to Favorites', and 'Save Order to Cart'.

- 3 To view the Dept box on the Shopping Cart page, click View in the My Shopping Cart section of the page. The Dept box appears, as shown in Figure 6.
- 4 You can also select the department on the Review and Complete Your Order (checkout) page. To do so, click the down arrow in the Specify Cost Center box.

Order Approval

You can set up individuals to approve orders. When an order exceeds a certain amount, you can require that the order be approved after it is submitted. For example, orders less than \$200 may not require approval, but orders exceeding \$200 must be approved. When an order requires approval, an email is sent to the approver who is setup for this shopper. After which, the order must be approved before it can be processed. To effectively use this feature, you set up approval groups.

Order Approval Shopper's Experience

Once you've set up approvers on the Administrative page, approvers can easily find orders that require attention.

- 1 In the My Account section of the page, the number of orders awaiting approval display beside the Pending Approval link. Click the Pending Approval link. You can also select My Orders from the pull down menu and choose Order Approval. Then, click the Pending Approval tab.

Figure 6:
Viewing the
Dept Box in the
Shopping Cart

The screenshot shows the 'My Shopping Cart' page on the ecInteractive website. The page includes a navigation bar with links for Home, My Account, My Orders, Shopping, and Featured Items. A search bar is located at the top left. The main content area displays a table of items in the shopping cart:


Item #	List Price	Your Price	Packaging	Quantity	Ext. Price	Delete
BICCG11BE Cristal Gel Stick Roller Ball Pen, Blue Barrel, Blue Ink, Medium Point	\$6.25	\$4.38 /Dozen	1 Dozen/Box	1	\$4.38	<input type="checkbox"/> Delete
AMP16157 Combo Hanging File Folders, 1/3 Tab, Letter, Assorted Colors, 12 Sets/Box	\$21.50	\$17.20 /Box	24 Each/Box	1	\$17.20	<input type="checkbox"/> Delete

Below the table, there are 'Dept' selection boxes for each item, with values '3' and '2' respectively. The page also features buttons for 'Continue Shopping', 'Print', 'Empty Cart', 'Save Changes', 'Save Order', and 'Check Out'. The subtotal is displayed as \$21.58. On the right side, there is a 'Specials' section with promotional offers for a laser printer and Pentel products.

The Pending Approval tab also shows those orders that are currently locked.

- 2 The Order Approval page opens, displaying the Pending Approval tab. See Figure 7. This tab shows only those orders that are awaiting your review. The Total column displays the order's total, including tax. You can re-sort the orders by clicking the Submitted By, Department, Date, and Purchase Order headings.

Note: The ability to view this page depends on the approver type. If you are the individual whose order is awaiting approval, the Pending Approval page does not appear. If you are a mid level or top level approver, this page is available as long as you are part of the approval group. Orders you have previously approved or denied appear on the Approval History tab.

- 3 Click Show Legend to view the status legend detail at the top of the page. To hide the legend information, click Hide Legend.
- 4 To change approval settings, click the Order Approval Settings link.
 - 4.1 Set the sort and order information preferences.
 - 4.2 Scroll to the bottom of the page. Click the Save Changes button.
 - 4.3 Click the Back to Approval History link.
- 5 To view line item information, click  beside the order. The order information opens.

**Figure 7:
Viewing the
Pending
Approval Tab**

- 6 You can approve or deny entire orders or specific line items. You can also modify the existing order. To approve or deny individual line items, go to **Step 7**.
 - To approve or deny all orders, click the All check box. Then, click Approve or click Deny. If you deny all orders, you are prompted to enter the reason for doing so.
 - To approve a specific entire order, click the check box corresponding to the order and click Approve.
 - To deny a specific entire order, click the check box corresponding to the order and click Deny. Enter the reason for declining the entire order.
- 7 To approve or deny individual line items, to change an item's quantity, or to add additional items to this order, click Edit. The line items appear on the Review Orders page. On this page, you can:
 - 7.1 Click the Long PO box to enter a long purchase order number.
 - 7.2 Click the Short PO box to enter a short purchase order number.
 - 7.3 Click the appropriate Shipping Method to use for the order.
 - 7.4 Click the Shipping Instructions box to enter shipping information.
 - 7.5 Click the Special Instructions box to enter special instructions on the order, Drop Package at the Back Door, for example.
 - 7.6 Use the Payment Method Override options to change the payment method to use for this order.
 - 7.7 In the bottom section of the page, click the Quantity box to change the ordered quantity.
 - 7.8 To view the item's product information, click the item's number.
 - 7.9 To deny an individual line item, click the Deny check box. When the Reason box opens, click the box and enter the reason why this item is being denied. You can specify up to 50 characters. Repeat this process to deny each line item.
 - 7.10 Click Add New Items to add additional line items to this order. Enter the item information including any item comments and click Save to Pending Order. You can continue to add as many items as needed.
 - 7.11 If available, click Add Coupon or Promo to add a coupon or promotion to this order. For more details, see the **Coupons and Promotions** heading.


Steps 7.1 through 7.6 can be performed only if the approver's or shopper's Checkout Settings allow changing this information.

- 8 When you finish making changes:
 - Click Save Changes to return to the Approval page.
 - Click Approve Order to approve the entire order. Items on the order that are not marked to be deleted are approved. The approval confirmation summary page includes the ordered date, processed date, and purchase order number, if any.
 - Click Deny Order to deny the entire order. You are prompted to enter the reason why you are denying the entire order.

Viewing Approval History

The Approval History tab displays the orders that were submitted for approval. If you are the individual whose order was submitted for approval, this tab shows orders that were either approved or denied. This helps you quickly track your orders. If you are a mid level or top level approver, this page shows any orders that you approved or denied as part of the approval process. If the order was approved but now requires further approval, it appears as awaiting approval. In addition, if an order was denied, you can also select it and re-submit it for approval in this tab.

Note: When re-submitting an order for approval, you can delete an item or change an item's quantity. However, you cannot add additional items to the order.

- 1 From the Order Approval page, click the Approval History tab. This tab displays any orders that have been approved or denied. The Total column displays the order's total, including tax. You can re-sort the orders by clicking the Submitted By, Department, Date, and Purchase Order headings.
- 2 To view line item information, click  beside the order. The order information opens.
- 3 If an order has been denied, you can re-submit the order for approval. To do so, click the check box beside the denied order.
- 4 After the page refreshes, click Edit. The line items appear on the Review Orders page. On this page, you can change the information, including the purchase order number, shipping method, shipping instructions, override the payment method, change quantities, add comments, deleting lines, and so on.
- 5 When finished, click Save Changes to return to the Approval page.

Coupons and Promotions

This tool can be used to further promote your site by adding an additional eCommerce ordering feature. You can offer promotions such as free goods, samples, and gifts added to a customer's order based on different qualifying amounts. For example, you can send a free coffee mug to any customer who meets an order amount of \$100. You can also set up one-time or reusable coupons to apply to orders.

There are several different promotional types you can give, including:

- **Choice of Additional Items:** This type lets you add items to the customer's order free of charge, for example, buy three boxes of pens, get your choice of two free items.
- **Discount Matching Items:** This type provides a discount on items that match the items you specify. When the matching item is purchased, the discount is applied
- **Discount Current Order:** This type can be used to offer a discount using either a percentage or dollar amount off of the current order, purchase \$100 and receive \$10 or 10% off your current order, for example.
- **Discount off First Web Order:** This type gives the customer a first-time order discount. The front-end system verifies that this is a first order for the selected customer. For example, you could allow \$25 off a first-time order of \$100 or more.
- **Discount Next Order:** This type gives the customer a discount when the next order is placed. The system displays the discount when the back office business system determines this is the customer's next order. For example, you could specify that if shoppers order three boxes of pens, they'll get 10% off their next order, or you could set up a promotion that allows shoppers \$10 off their next order when their current order totals \$100 or more.
- **Discount Highest Priced Item:** This type offers a discount for the highest priced item on the customer's current order, 5 or 10% off, for example.

Setting Up the Coupons and Promotions Feature

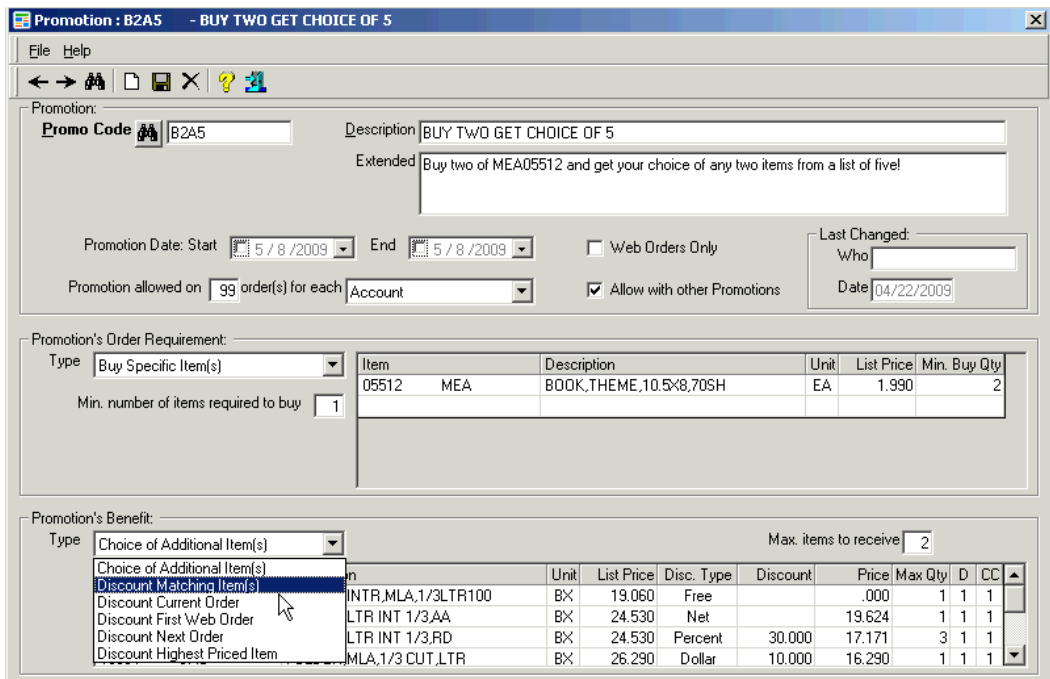
You begin by setting up the coupons and promotions you intend to use in the back office business system. In the Master Menu, click the Databases menu and select Promotions. The Promotions window opens, as shown in Figure 8. In the Promotions window, the Promotions Order Requirement Type and Promotions Benefit Type boxes work together to determine the promotion being offered. For further details, see your back office business system online documentation.

To delete an existing Marketing setting, click the down arrow in the Select Settings box and select the setting to remove. Click Delete. At the Do You Want to Remove This Setting prompt, click OK. Marketing settings cannot be deleted if they are currently assigned to a shopper.

After you set up promotions in the back office system, you must allow access to the coupons and promotions feature on your front-end site.

- 1 Log in to your ecInteractive or is.D-Force 2 Administrative Control Panel.
- 2 Click the Consumer Config training toolbar and choose Marketing. You can also click Customer Settings and choose Marketing. The Managing Marketing Settings page opens.
- 3 The Select Setting drop down box defaults to display the New Marketing Setting option. You can add, edit or delete settings.
 - To add a new setting, leave the Select Settings box set to the New Marketing Setting option. Click the Setting Name box and enter a name for the new setting. Go to **Step 4**.
 - To rename or edit an existing setting, click the down arrow in the Select Settings box and select the setting to change. Then click the Setting Name box and enter the new name over the existing name. Go to **Step 4**.
 - The Default setting name has been added for your convenience. To alter Default settings, click the down arrow in the Select Settings box and choose Default. Once you have edited the Default setting, we recommend you do not make further changes to this setting. Go to **Step 4**.

Figure 8: Setting Up Coupons and Promotions on the Back Office Business System



Once you have set up promotions and allowed access to them in Marketing Settings, there are many ways to communicate your promotions to your shoppers, including Site Text, Custom HTML confirmation messages, and/or other marketing tools and campaigns. For more details, see your online help.

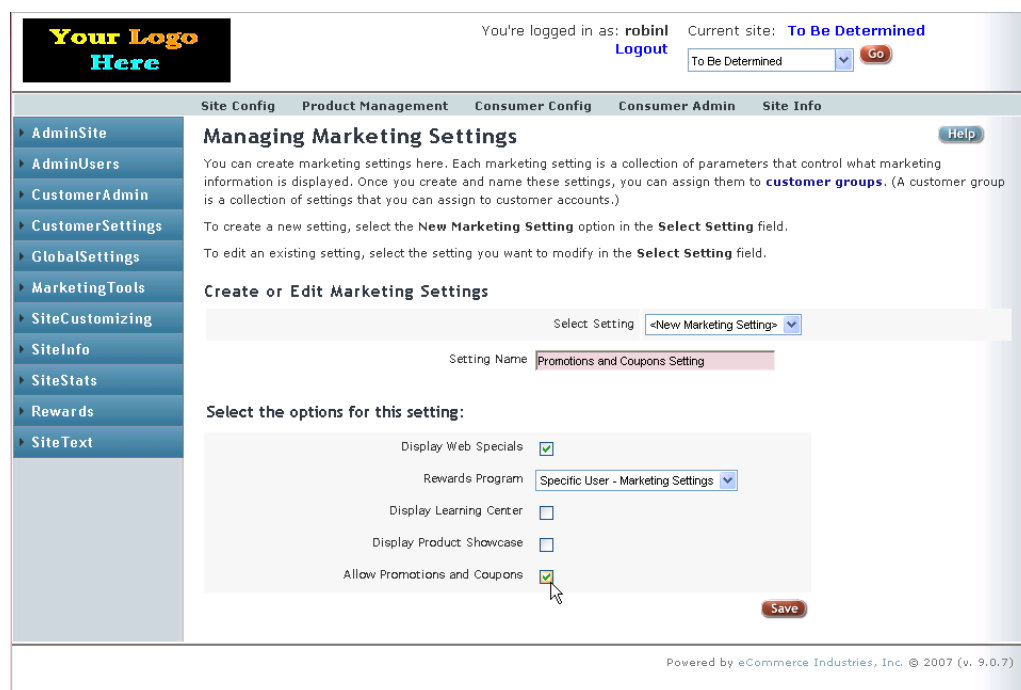
- 4 Click the Allow Promotions and Coupons check box. See Figure 9.
- 5 When finished, click Update to save an existing setting or click Save to save a new setting.
- 6 Repeat these steps for any other setting groups to allow access to promo codes.
- 7 Use Customer Admin to assign this Marketing setting to each user to enable the Promotions and Coupons feature on the front-end site.


Viewing an Order's Coupon and Promo Code Detail

In the ecInteractive or is.D-Force 2 Administrative Control Panel, you can see when orders include promotions or coupons in Order Management.

- 1 From within your Administrative window, click the Site Info training toolbar and choose Order Management. You can also click Customer Admin and click Order Management.
- 2 Specify the orders to view by date, order number, or account as needed.
- 3 When finished, click Retrieve Orders.
- 4 After the page refreshes, you can further limit the orders to view by name, email address, order number, status, account, department or status date.

Figure 9:
Selecting the Allow Promotions and Coupons Marketing Setting



- To view order detail, including the promotional information, click  corresponding to the order to view. The coupon code and description appears under the Promotions/Coupons heading.

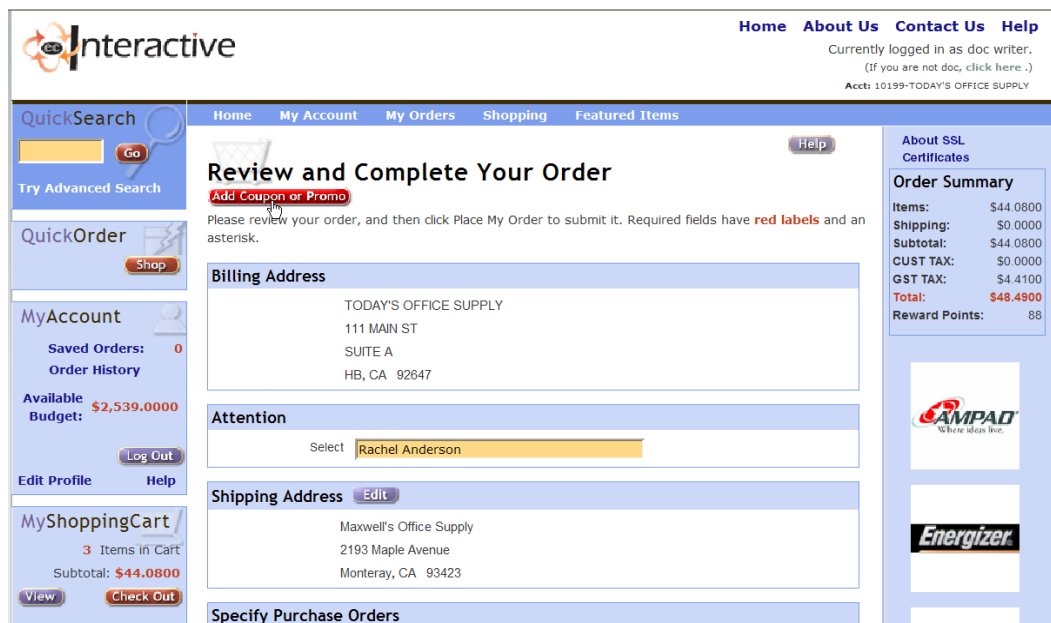
Coupon and Promotions Shopper's Experience

Once you set up your system to use coupons and promotions and enable shopper access, when your shoppers meet the coupon or promotion requirements the Add Coupon or Promo button appears on the Review and Complete Your Order or Order Approval pages.

- From the Review and Complete Your Order or Order Approval pages, click the Add Coupon or Promo button. See Figure 10.
- Once clicked, the Coupons and Promotions page opens. Click the Code box and enter the promotional code.
- If you are set up for multi-department ordering, click the down arrow in the Order Department box and choose the department for this promotion.
- Click Apply. The system checks the code's validity.
- If valid, the promotions associated with this code appear under the Here Are the Coupons/Promotions Applied To Your Order heading. You can now add, select, or remove promotions as necessary.
- When finished, accept the promotion by clicking Save Changes, as shown in Figure 11. The coupon and promotional information appears under the Your Items section on the Checkout page. If a free item was

If the code is invalid, the system displays an error message.

Figure 10:
Clicking the Add Coupon or Promo Button



The screenshot displays the 'Review and Complete Your Order' page. At the top, there is a navigation bar with links for Home, My Account, My Orders, Shopping, and Featured Items. Below this, a sidebar on the left contains sections for QuickSearch, QuickOrder, MyAccount (with Saved Orders: 0 and Order History), and MyShoppingCart (with 3 items in cart and a subtotal of \$44,0800). The main content area features the heading 'Review and Complete Your Order' and a prominent red button labeled 'Add Coupon or Promo'. Below the button, a message asks the user to review their order and click 'Place My Order' to submit it. The page is divided into several sections: 'Billing Address' (showing 'TODAY'S OFFICE SUPPLY' at '111 MAIN ST, SUITE A, HB, CA 92647'), 'Attention' (with a dropdown menu showing 'Rachel Anderson'), and 'Shipping Address' (showing 'Maxwell's Office Supply' at '2193 Maple Avenue, Monterey, CA 93423'). On the right side, there is an 'Order Summary' table and logos for AMPAD and Energizer.

Order Summary	
Items:	\$44.0800
Shipping:	\$0.0000
Subtotal:	\$44.0800
CUST TAX:	\$0.0000
GST TAX:	\$4.4100
Total:	\$48.4900
Reward Points:	88

added, the text Free appears as the item's price. Any coupon codes and descriptions included on the order also display. See Figure 12. The promotional information appears when printed and is shown when viewing order detail in Order History.

Figure 11:
Clicking Save Changes to Accept the Coupon or Promo

ecInteractive Home About Us Contact Us Help

Currently logged in as Test Customer 1.
(If you are not Test, [click here](#).)
Acct: 5535-TANGY TAFFY, INC.

QuickSearch Home My Account My Orders Shopping Featured Items

Coupons and Promotions

Enter your coupon or promotion code to add to your order.

Code Order Department

Go

Here are the coupons/promotions applied to your order.

Be sure to click "Save Changes" to apply coupons to your Cart.

Order Department:

BUY TWO GET CHOICE OF 5

Buy two of MEA05512 and get your choice of any two items from a list of five!

Item #	Qty	Price	Description
SMD10235	1	\$19.62	Interior Folder, 1/3 Cut Tab, Letter, Aqua
SMD10267	1	\$17.17	Interior Folder, 1/3 Cut Tab, Letter, Red

Save Changes

Web Specials

Shipping Tags, #7, Plain, 5-3/4"x2-7/8" Price:\$47.68

Figure 12:
Displaying Coupon and Promotion Information on the Checkout Page

Your Items

Department 101 SHIPPING & RECEIVING DEPT Shipping: \$0.00

Item #	Your Price	Packaging	Quantity	Ext. Price
SMD73390	\$3.13 /Each	10/Box	1	\$3.13
File Pockets, 5-1/4" Exp, 1200 Paper Cap, Letter, Red Rope				
Comments:				
HEWCB412A	\$256.00 /Each	1 Each	1	\$256.00
Laserjet Printer,24PPM,600dpi,14-9/10"x9-3/5"x8-9/10",CCL				
Comments:				
HEW112000	FREE /Ream	500/Ream	1	FREE
M/Purpose Paper,20Lb,8-1/2"x11",96 GE/112 ISO,500/RM,WE				
Comments:				
Coupon Code	Description			
100056FR	FREE REAM PAPER WITH PURCHASE OF HP P1505			
12321DNO	SPEND OVER \$250 AND GET \$10 OFF YOUR NEXT ONLINE O			
12321DNO	SPEND OVER \$250 AND GET \$10 OFF YOUR NEXT ONLINE O			